

Policies and Procedures for Access to CANVaS

for the administration of the

Virginia Child and Adolescent Needs and Strengths (CANS) Assessment

**Comprehensive Services Act for at-Risk Youth and their Families (CSA)
June 25, 2009**

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Section I. Introduction

Welcome to CANVaS! CANVaS is the web-based application of the Virginia Child and Adolescent Needs and Strengths (CANS) Assessment tool. As of July 1, 2009, the CANS will replace the CAFAS® as the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act.

Information entered into CANVaS is confidential. It is difficult to overstate the importance of ensuring at all times that the information regarding children and families entered into CANVaS be kept confidential. Individuals who have access to CANVaS must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized.

All users of CANVaS, no matter what role or level of access, must sign a Users' agreement, which may be found in Section VI of this document. The Users' agreement will be authorized by a case manager's supervisor and the Designated Super User/Report Administrator or the Office of Comprehensive Services, depending on the role of the user.

This document is intended as a quick resource to use in the process of gaining access to CANVaS. Additional detail regarding the system is found in the Users' Manual, which is posted on the CANVaS Home Page at <https://canvas.csa.virginia.gov>

Acronyms and terms used in this document:

CANS – Child and Adolescent Needs and Strengths assessment

CANVaS – not truly an acronym, indicates Virginia's version of the CANS

CAFAS®-Child and Adolescent Functional Assessment Scale

CSA-Comprehensive Services Act

OCS – Office of Comprehensive Services

RCR – RCR Technology, Help Desk for CANVaS

IT-Information Technology

HR-Human Resources

Case Manager-This term is used generically throughout this document to describe all local public agency staff who perform a CSA case management function. Agencies or localities may use terms such as "foster care worker", "social worker", "service coordinator", "school social worker", etc. The "case manager" is the individual responsible for assessing the strengths and needs of the child and family and working directly with the child and family to carry out the service plan.

Super User-This term describes a local public agency staff person who has received specialized training from Dr. John Lyons (the developer of the CANS) and been certified as a Super User by Dr. Lyons.

Designated Super User/Report Administrator- This term is used to describe a Super User who has been designated by the locality to provide authorization for access to CANVaS for case managers. Designated Super Users will be Report Administrators and will have a higher level of access to CANVaS. The acronym DSU/RA is used throughout this document for these individuals. Localities may elect to choose someone other than a Super User as the Report Administrator.

Section II

Policies and Procedures for Case Manager* Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool. As of July 1, 2009, CANS will become the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act (CSA) in Virginia.

Information entered into CANVaS is confidential. Individuals who have access to the system must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized.

Access to CANVaS for Case Managers

To access CANVaS, you must first read, complete and sign the Users' agreement in Section VI at the end of this document. This agreement must be approved by your agency supervisor and the Designated Super User/Report Administrator(s) in your locality. Your supervisor's approval is necessary to ensure that you have a legitimate right to access the system because of your job function and that you are an employee (case manager) of one of the four core CSA agencies (local Department for Social Services, Court Services Unit, Community Services Boards and public school system) or the locality's CSA office. The DSU/RA's authorization is needed to confirm that you are currently certified on the use of the CANS.

To find a Designated Super User/Report Administrator for your locality, look on the Super User Roster on the CSA website at http://www.csa.virginia.gov/rosters_reporting/cans3a.cfm. Not all Super Users are designated as Report Administrators who can approve access to CANVaS. Designated Super Users will have the letters "DSU/RA" (Designated Super User/Report Administrator) following their names on the roster. If your locality has chosen someone other than a Super User as Report Administrator, he/she will not be on this list; contact one of your Super Users for information. A separate listing will be on the CSA website in the near future.

The DSU/RA will need a copy of your current CANS certification from the Communitrics website at www.communimetrics.com/VirginiaCSA/Default.aspx. To print your verification, go to your certification test history and obtain your certification number (you may copy and paste); then click on "verify certification." Enter your certification number as directed and click on "submit." A statement should pop up with your name and dates of certification. Print this document and provide it to your DSU/RA.

*As noted in the Introduction, the term "case manager" is used generically in this document to describe all local public agency staff that perform a CSA case management function. Agencies or localities may use terms such as "foster care worker", "service coordinator", "school social worker", "social worker", etc. The "case manager" is the individual responsible for assessing the strengths and needs of the child and family and working directly with the child and family to carry out the service plan.

Levels of Access

As a case manager you will only have access to the assessments you enter and the reports generated by those assessments. Initially, only the Designated Super User/Report Administrator will be able to view all information in the system for your locality. Others such as chairpersons of Community Policy and Management Team will gradually be added to the list for access to reports in their localities, as needed.

Help Desk Support and Process for Access

RCR Technology will provide the Help Desk support for CANVaS. The RCR Help Desk may be reached by

- E-mail at: canvashelpdesk@rcrtechnology.com
- Phone at: (877) 727-8329
- Fax at: (317) 631-3345
- Mail at: CANVaS Help Desk
RCR Technology
251 North Illinois Street, Suite 1150
Indianapolis, Indiana 46204

You must fax or mail your signed and approved Users' agreement to the RCR Help Desk. You should keep a copy for your records. After sending your agreement, you must then contact the Help Desk either by e-mail or phone to request a password. You may choose your password which must be:

- a minimum of eight characters,
- not based on a single dictionary word and;
- include three of the following four:
 - a number,
 - a letter,
 - combination of upper and lower case numbers, or
 - special characters.

You will also be asked to provide an answer to a pre-selected secret question on the Users' agreement. You should **not** indicate on the Users' agreement which question you will be answering. Simply choose a question so you can provide this information readily to the RCR Help Desk. Do **not** write this answer on your Users' agreement. Once your approved agreement is received by the Help Desk, and you have contacted the Help Desk to establish a password and answer to your secret question, your account will be activated. If your request is electronically submitted, the Help Desk will respond within two business days. If by mail, the response time will be longer. You will then be able to access CANVaS at <https://canvas.csa.virginia.gov>

Termination of Employment

If you leave your position as case manager, your account must be deactivated. Your supervisor must contact either the Help Desk directly or the Designated Super User/Report Administrator who will contact the Help Desk to de-activate your account. Leaving your account open could

potentially jeopardize the confidentiality of the information you have entered. It is recommended that DSU/RAs periodically check the listing of case managers to ensure those who have left employment are removed from CANVaS.

Quick Steps for Accessing CANVaS for Case Managers

1. Read, complete and sign the Users' agreement.
2. Print a verification of your CANS certification from the Communimetrics website.
3. Obtain your supervisor's signature.
4. Obtain the signature of a Designated Super User/Report Administrator in your locality.
5. Fax or mail the Users' agreement to the RCR Help Desk.
6. Contact the RCR Help Desk by e-mail or phone to create a password and provide an answer to a pre-selected "secret" question.
7. RCR will authorize your account.
8. Log-in to CANVaS at <https://canvas.csa.virginia.gov>



Section III

Policies and Procedures for Supervisors of Case Managers to Access CANVaS

To access CANVaS, all agency case managers must obtain the signature of their supervisor. This signature is necessary to verify that the case manager:

- is an employee of the local Department for Social Services, Community Services Board, Court Services Unit, public school system or is a CSA staff person directly employed by the local government*; and
- has a legitimate right to access the system to fulfill job responsibilities.

Case managers will also need the authorization of the locality's Designated Super User/Report Administrator to confirm that they are currently certified on the use of the CANS. For more information about case manager access to CANVaS, please see Section II.

Termination of Employment

If a case manager leaves employment, the account must be deactivated. The agency supervisor must contact either the Help Desk directly or the Designated Super User/Report Administrator who will contact the Help Desk to de-activate the account. Leaving the account open could potentially jeopardize the confidentiality of the information that was entered. It is recommended that DSU/RAs periodically check the listing of case managers to ensure those who have left employment are removed from CANVaS.

*At this time, (January 2009), only public agency employees operating under the Comprehensive Services Act will have access to CANVaS. Employees of private provider agencies do not have access.

Section IV

Polices and Procedures for Designation of Super Users/Report Administrators and their Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool. As of July 1, 2009, CANS will become the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act (CSA) in Virginia.

Determination of Designated Super Users as Report Administrators

Designated Super Users will be identified by each locality to serve as Report Administrators. Report Administrators will authorize case manager access to CANVaS and will have access to the locality's CANVaS data. Designated Super Users/Report Administrators (DSU/RA) must have been trained and certified by Dr. John Lyons. As some localities have multiple Super Users, it must be clearly determined at the local level who will carry out the responsibilities for access to CANVaS. Some larger localities could assign a Super User at each of the core CSA agencies to perform this function. A general rule of thumb to follow is one Super User/Report Administrator for each 100-125 children the locality is currently serving. Localities may determine that it is more appropriate for an IT, HR or other staff person to serve in this role, and in those cases, exceptions can be made. If so, that individual should follow the same process for access and authorization as the Designated Super User by contacting OCS for approval.

Designated Super User/Report Administrator Approval Process

Requests to become the DSU/RA for a locality must be sent to the Office of Comprehensive Services. With the initial roll-out of CANVaS, localities are asked to provide the names of the Super Users (or other individual) that they wish to serve in this role. Each designated individual must read and sign the Users' agreement, have their supervisor sign, and fax or mail the form to Carol Wilson at OCS for confirmation. Faxes should be sent to (804) 662-9831 and the mailing address for OCS is:

Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

Designated Super Users/Report Administrators may, but do not have to submit verification of their CANS certification. OCS will use the master list provided by Communimetrics to verify certification. OCS will keep the signed copies of the Users' agreement and e-mail the individual that he or she is confirmed to serve as a Designated Super User/Report Administrator. The e-mail will be copied to the RCR Help Desk to verify the DSU/RA's authorization for access and authorization to approve case manager access. Individuals may request that the signed Users' agreement be returned, in which case OCS will keep a copy and return the original to the DSU/RA.

OCS will be responsible for providing the RCR Help Desk with the names of the Designated Super Users/Report Administrators authorized by OCS, either individually or in a list. The Help Desk will verify that the DSU/RAs names on the Users' agreements faxed by case managers are on the listing.

Log-in to CANVaS

The Designated Super User/Report Administrator will contact RCR to create a password and provide the answer to a pre-selected secret question. The listing of possible questions is provided on the Users' agreement. Do **not** indicate on the agreement which question you are selecting and do **not** write the answer on the agreement. RCR will activate this account with a level 2 access to the system. The DSU/RA may then log-in at <https://canvas.csa.virginia.gov>

Level of Access

Designated Super Users/Report Administrators will have a higher level of access to the system than case managers. They will be able to see reports of all the CANS assessments in their locality. Some DSU/RAs may serve multiple localities and will have access to CANS reports for each of those localities.

Removal from Designated Super User/Report Administrator List

When an individual will no longer serve as a Designated Super User/Report Administrator, he or she must notify OCS and the RCR Help Desk to remove his/her name from the authorized DSU/RA list. The Help Desk will de-activate the account. OCS will remove the DSU/RA designation by the individual's name on the CANS Super User Roster on the CSA website at www.csa.virginia.gov

Quick Steps for Designated Super Users to Access CANVaS and Become an Approved "Designated Super User/Report Administrator."

1. Determine locally who will be the Designated Super User(s)/Report Administrator(s).
2. Read, complete and sign the Users' agreement.
3. Have your supervisor authorize your access.
4. Fax or mail signed agreement to OCS.
5. Receive authorization approval from OCS by e-mail. RCR will be copied on this e-mail so they may register you and add you to the DSU/RA list.
6. Contact the RCR Help Desk by e-mail or phone to create your password and provide the answer to your pre-selected secret question.
7. RCR will create your account.
8. Log-in to CANVaS at <https://canvas.csa.virginia.gov>



Section IV

Policies and Procedures for Role of Designated Super User/Report Administrator in Assisting Case Manager Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool. As of July 1, 2009, CANS will become the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act (CSA) in Virginia.

Information entered into CANVaS is confidential. Individuals who have access to the system must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized.

Role of Designated Super User/Report Administrator

Designated Super Users/Report Administrators must verify that the case manager is currently certified on use of the CANS. (The case manager should provide you with a copy of the printed certification from the Communimetrics site.) You may also verify certification on your locality's listing on the Communimetrics site at www.communimetrics.com/VirginiaCSA/Default.aspx

Role of Agency Supervisor of Case Manager

Case managers must obtain the signature of their agency supervisors to verify that they:

- are employees of the local Department for Social Services, Community Services Board, Court Services Unit, public school system or is a CSA staff person directly employed by the local government*; and
- have a legitimate right to access the system to fulfill job responsibilities.

Role of Case Manager

Case managers must read, fully complete and sign the Users' agreement found in Section VI of this document. It is their responsibility to obtain the authorization signatures and will access your contact information on the CSA web site. After they have obtained your authorization (and that of their supervisor) the case manager will fax or mail the form to the RCR Help Desk. He or she will then contact the RCR Help Desk to obtain a password, provide an answer to a pre-selected question and be given access to CANVaS. (See Section II for policies and procedures for case manager access to CANVaS.)

Locality Listing of Authorized Case Managers

Designated Super Users should keep a copy of the case manager agreements they have authorized. It may be helpful to create a listing of names, certification dates and e-mail addresses.

Section VI

CANVaS Individual User and Confidentiality Agreement

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool. As of July 1, 2009 CANS will be the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act (CSA) in Virginia.

Instructions:

For case managers, please provide the requested information and submit the approved agreement to the CANVaS Help Desk at fax number (317) 631-3345 or mail to the address on the form.

Everyone must read, initial and submit page 11 and complete the first page of the form itself (page 12 of this document). Case managers must also have page 13 completed with the signatures of his/her supervisor and DSU/RA. All three pages must be submitted for case managers (11,12,13). Designated Super User/Report Administrators need to complete and submit pages 11, 12 and 14 to OCS at fax number (804) 662-9831 or by mail to:

CANS Administrator
Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

Confidentiality Agreement

This form shall be signed by an employee of any public agency needing access to CANVaS. It defines the requirement to maintain confidentiality and the employee agreement to abide by the system rules. A signed copy is maintained by the authorized User and the Super User who confirms the certification of the User.

All information in the system is confidential and all Users have the responsibility to abide by applicable confidentiality laws. Users who violate these laws will have access to CANVaS immediately revoked. If a User believes that the confidentiality of his/her password has been compromised, he/she must immediately change the password and notify the Help Desk of the concern.

Case managers may only access family and child specific information for those individuals with whom they are working.

By signing this form, the User acknowledges the conditions under which access to CANVaS is granted and agrees to be held to these conditions.

By initialing page 11 and signing below (on page 12), the User acknowledges the following:

- I have read and agree to abide by the CANVaS Confidentiality Policy.
- I understand that information in CANVaS is confidential and can only be used for those purposes as required by the Comprehensive Services Act.
- I am responsible for safeguarding my system user ID and password.
- I will not permit others to utilize my User ID and password. _____ Initials (p.11)

- I will keep my User ID and password confidential and will not share with anyone.
- My computer will not be left unattended when a CANVaS session is open.
- A lock-out screen saver will be used after a period of 30 minutes.
- I will always log off and close the browser when finished with a CANVaS session.

By signing the agreement, the authorized User acknowledges that if he or she leaves employment, that he or she has no right to and will not access the information in CANVaS. The User further acknowledges that this Agreement is binding after termination of employment and confidential information such as User ID or password or consumer information shall not be shared with others.

CANVaS Individual User Agreement and Confidentiality Agreement

Please provide all of the following information. (Incomplete forms will not be accepted.)

1. Name of Locality: Name of Agency: Agency Address:	
2. Name and title of Individual who needs CANVaS access:	
3. <input type="checkbox"/> New User <input type="checkbox"/> Change	
4. E-mail Address:	
5. First Name: (please print clearly) Last Name: (please print clearly)	
6. User's Signature: (signature indicates acceptance of terms in the Confidentiality and Users' Agreements) <div style="text-align: center;">Phone Number: (include area code)</div>	
7. Attach copy of CANS Certification Number and Expiration Date from Communimetrics site. (DSU/RA must verify at time of approval.)	
7. Secret question: (to be used in the event of a lost password-Pick only one question. <u>Do not indicate which question or note the answer on this form</u>) <div style="padding-left: 20px;"> 1. Which phone number do you remember most from your childhood? 2. What was your favorite place to visit as a child? 3. Who is your favorite actor, musician, or artist? 4. What was your favorite school subject? 5. What is your grandfather's first name? </div> <p style="padding-left: 20px;">Do <u>not</u> indicate which question or write the answer to the question on this form. The User will provide the answer to the question to the RCR Help Desk when establishing a password.</p>	
<div style="display: flex; justify-content: space-between;"> <div> Role of User: 1. Certified CANS user/case manager _____ </div> <div> 2. Report Administrator _____ 3. Data entry only (must be approved by OCS)_____ </div> </div>	

Authorization Page

CANVaS Individual User Agreement and Confidentiality Agreement for

CASE MANAGERS

Supervisor Authorization: As the agency supervisor of _____

(User requesting authorization), I verify that he/she is an employee of

_____ and

requires access to CANVaS, the online CANS assessment, for his/her job duties.

Signature: _____

Date: _____

Designated Super User/Report Administrator Authorization: As a Designated CANS

Super User of _____ locality, I have verified that the current CANS

certification of _____ (name of User requesting authorization) is

_____ (insert number) with the following date of expiration

_____.

Signature: _____

Date: _____

Please fax to (317) 631-3345
or mail the completed form (pages 11-13) to:

CANVaS Help Desk
RCR Technology
251 North Illinois Street, Suite 1150
Indianapolis, Indiana 46204

All three pages of Section VI must be submitted (pgs 11, 12, 13).

Authorization Page

CANVaS Individual User Agreement and Confidentiality Agreement for

Designated Super User/Report Administrator

Supervisor Authorization: As the agency supervisor of _____

(User requesting authorization), I verify that he/she is an employee of

_____ and

requires access to CANVaS, the online CANS assessment, for his/her job duties.

Signature: _____

Date: _____

Designated Super User/Report Administrator Authorization: As a Designated CANS

Super User of _____ locality, I have included a copy of my current

CANS certification.

Signature: _____

Date: _____

Please fax to (804) 662-9831
or mail the completed form (pages 11, 12 and 14) to:

CANS Administrator
Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

All three pages of Section VI must be submitted (pgs 11, 12, 14).